

## **RETIREMENT FUND WEB USER MANUAL**

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**<http://www.mymgf.co.za>**

## **Your Pension/Provident Fund**

Member access on the Retirement Fund WEB

<http://www.mymgf.co.za>

### **1. BACKGROUND**

The Retirement Fund Web facility allows members access to their fund benefits and related information.

### **2. FACILITIES AND INFORMATION AVAILABLE VIA RETIREMENT FUND WEB**

Members will have access to the following facilities and information:

#### **2.1 “Online Benefit Statement”**

The values on the Online Benefit statement will be updated on a daily basis. The member share composition history can give you historic data on your member record for the past 12 months. If you belong to a Pension and Provident fund, both funds’ values will be displayed beneath each other on one screen.

#### **2.2 “Investment Choices”**

This application will only be available if your fund/employer has agreed to let members elect investment choices via the website.

On this screen, you can view the current investment composition of your fund values as well as the choice of investment portfolios for future contributions.

You can change your investment portfolio composition and/or the composition of your future contributions via this facility.

#### **2.3 “Membership Certificate”**

This certificate serves as proof of your membership of the fund.

#### **2.4 “Retirement Benefit Calculator” – busy re-writing this calculator**

We are still in the process of re-writing this calculator. It is important to us to ensure that our calculator tool provides accurate calculations and indications of your projected fund values at retirement. Please be patient while we develop this functionality.

### 3. HOW DO MEMBERS GET ACCESS?

- All members of the Retirement Fund on 1 August 2011 have been registered for access on the Retirement Fund website.
- Send us **your full name, surname, identity number** via e-mail to **retirementfundweb@sanlam.co.za** to obtain your login details
- Please change the password as soon as possible to your own secure password.
- Your password must be 9 characters long and preferably be alpha-numeric. The password is also case sensitive.
- You can change your password at any time, if you feel it has been compromised.

### 4. STEP BY STEP INSTRUCTIONS

#### 4.1 How to login:

- Via the Internet with the following link: <http://www.mymgf.co.za> use the same login path via the Your Account logon button.
- Type in your “**username**” and “**password**”.
- Click “**Login**” button.
- On the menu that appears on the left hand side of the screen, select “**Online Benefit Statement**”, “**Membership certificate**” or “**Investment choices**”.

#### 4.2 How to select a required facility:

##### 4.2.1 “Online Benefit Statement”

- Move the cursor over “**Online Benefit Statement**” on the menu and click on the item.
  - You will see all your benefits on one screen. Just scroll down to view all the information.
  - Under each build-up of the current member share, you will see a link: “**Click here to view current member share composition**”. This will show you the build-up of your current share for the current month to date.
  - If you click on the link: “**Click here to view member composition history**”, a report will open on your screen and you will be able to view your member shares for the past 12 months.
  - If you click on the “+” sign next to every date, the build-up of that specific month will be shown. Click on the “**floppy disk**” icon at the top of the report to export it to the type of file format you want to save it in.

- This means you can now view a year's historic data on your member record.

#### 4.2.2 "Membership Certificate"

- Move the cursor over **"Membership Certificate"** on the menu and click on the item.
  - If you click on the **"Print certificate"**, a new window will open up with the certificate which you can print.
  - The certificate will indicate the benefits you qualify for under the fund.

#### 4.2.3 "Investment Choices"

- Move the cursor over **"Investment Choices"** on the menu and click on the item.
  - Click **"Change choice"**.
  - Complete the forms on the screen according to the instructions provided and afterwards click on **"submit"**. **PLEASE NOTE:** you can e-mail yourself a copy
  - The next screen will give you a summary of your newly elected portfolios, which you **MUST** confirm by clicking on **"Yes, I agree"**, or
  - If you want to change it back again, you are allowed to go back to the option screen, by clicking on **"No, go back"**.
  - Please make sure you read all the notes on the pages and follow the instructions carefully. The onus remains on you as a member to ensure that Sanlam Employee Benefits receives the investment instruction. Please ensure that you receive written confirmation from Sanlam Employee Benefits that they have received the instruction (over and above the copy you receive from the web).

### 4.3 ENQUIRIES

**Please direct your relevant administrative enquiries to Client Service**

For Client Services (North) call 0861 223 646

**For technical questions, username or passwords, please contact one of the following persons:**

- Chantel van der Linde - Tel: (021) 947-9097
- Zuki Jacobs - Tel: (021) 947-5350
- Lurlin Murray - Tel: (021) 947-1800
- Audrey Petersen - Tel: (021) 947-2259 (Team Leader)

## 5. FREQUENTLY ASKED QUESTIONS

### 5.1 How secure is the new website?

- HTTPS-site (secure environment).
- Security encryption (Entrust certificate information available on the site).
- Firewall.
- Extensive vulnerability and penetration testing was done by an independent auditors firm.
- Stress testing was done on this website to test load impact.
- A pin-code for each user will ensure the confidentiality and security of member information.
- Daily back-ups of all data are made and stored off-site.
- We have regular Disaster Recovery exercises.
- We use a management tool to monitor the traffic on the website.
- Internal and external auditors audit our infrastructure, security and processes regularly.

### 5.2 What do I do if my web browser does not comply with the new web?

The web was designed to be used by all the latest browsers available on the market. If your browser is not compatible, please contact your Technical Service Provider and arrange for an upgrade to a more relevant version. The new Retirement Fund WEB supports the following browsers:

- Microsoft Internet Explorer 7
- Mozilla Firefox 3
- Google Chrome 9
- Safari 5
- Opera 11

### 5.4 How often is the data updated on the new web?

We still endeavour to update our data every night.

### 5.5 Is the web available 24/7?

No, because our data updates and general system maintenance take place in the evenings and over weekends. We therefore request our users to only work on the website during office hours (8h00 – 17:00) on Mondays to Fridays.

### 5.6 What changes did you make on the new web?

- Once you have logged in successfully on the site, you will note that the menu items are now listed on the left hand side of the screen. Also, only the applications that you have access to will appear on the menu list.
- The Online Benefit Statement now provides much more information.
- It is important to note that certain applications have a “Help” flag at the top right of the screen when it opens.
  - If you click on this flag, a help function will assist you with the more common issues usually experienced by users.
  - To close the help function, just click on the “Help” flag again.
  - This functionality is currently available on the “Online Benefit Statement” and “Investment Choice”.

- If you want to create a PDF file, please ensure that you have the necessary software installed which will enable you to “print” to PDF. If you do not have this software, please contact your IT department.
  - Recommended software to use for printing to PDF is:
    - PrimoPDF ([www.primopdf.com](http://www.primopdf.com))
    - DoPDF ([www.dopdf.com](http://www.dopdf.com))
    - CutePDF ([www.cutepdf.com](http://www.cutepdf.com))
  - This software will allow you to follow normal printing procedure on your browser.
  - Choose “create PDF” and not your normal printer.
  - The PDF document will then be created.
- Our new website is now also accessible to our sight-impaired users through the use of special tools which enable them to “read” the content.